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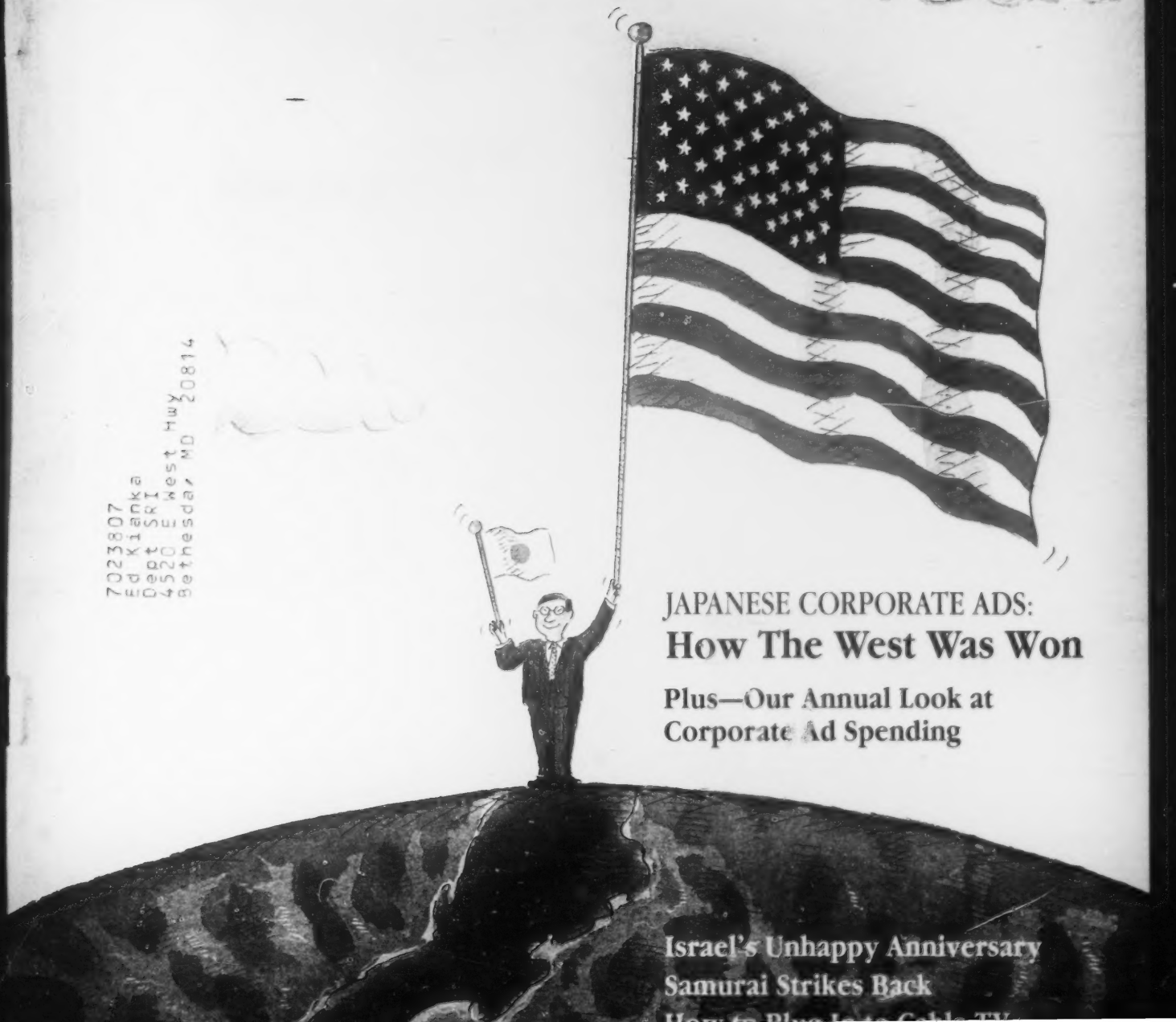
September 1988



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JAPANESE CORPORATE ADS:

How The West Was Won

Plus—Our Annual Look at Corporate Ad Spending

Israel's Unhappy Anniversary

Samurai Strikes Back

How to Plug In to Cable TV

PUBLIC RELATIONS JOURNAL

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Spending continues to reach new heights, as the big players pour more into their corporate-ad tills. *By Amy J. Barnes*

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When the Israeli government planned its 40th anniversary celebration in the U.S. last year, it hoped to display its cultural wares and democratic ways to cheering, supportive crowds. But the birthday bash got off to a rocky start when stone-throwing Palestinians sent Israel's image plummeting. How did the planners respond? And, now that the party's almost over, what can Israel do to improve its popularity? *By Walter Ruby*

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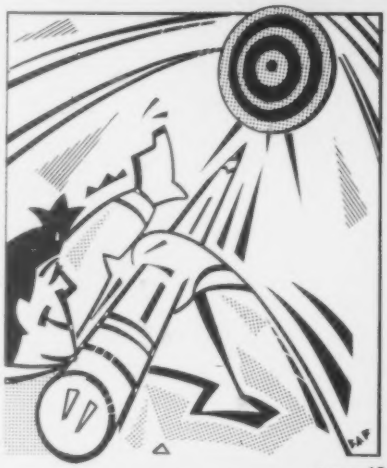

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The *Public Relations Journal* is published by the Public Relations Society of America, 33 Irving Place, New York, NY 10003.

Cover Illustration: *Paul Meisel*

FEEDBACK

Video vérités

If practitioners are singing the "video news blues" as you suggest in "Now You See Them . . . " (May, page 14) it's probably because they have written the tune themselves.

Monitoring and usage measurements are far from perfect, for either print or broadcast. I have no doubt that there are some producers and VNR distributors who use less-than-reliable methods of reporting. However, my experience has been these folks are doing the best they can with what we give them and ask them to produce.

A successful VNR must be part of an integrated publicity plan; have some news value; be shot, written, and edited like a television news story; and meet certain technical standards.

Since 1963, the Roper Organization has found that the majority of the American public gets its news from television. Despite that, most public relations practitioners are still print oriented and refuse to learn about the technology or opportunities the video medium offers.

John Brace
Adjunct Professor, Corporate Public Relations
Medill School of Journalism
Northwestern University
Chicago, IL

Your recent article on the scandal surrounding video-news-release reporting was welcome and long overdue. It has many public relations professionals questioning the value of the VNR. However, these professionals should also be asking themselves another question. How could so much chicanery be going on in the first place? The answer, we believe, is simple: uneducated consumers.

For every one VNR company that spends thousands of dollars and hundreds of hours developing and improving its VNR production, distribution, and follow-up capability, there are five charlatans with no knowledge of the public relations business or of what it takes to convey a message to target audiences. Public relations professionals who have not learned how the broadcast media think and work are the fair game of these impostors. As the Romans used to say, caveat emptor.

Kevin E. Foley
President
KEF Media Associates
Chicago, IL

The article by Meryl Davids on VNR distribution was an especially informative look at one of public relations's important tools.

We have experimented with several forms of VNR distribution, including using companies that distribute by satellite and hard copy, as well as trying in-house duplication and distribution. Every tape has had a different rate of pick-up and interest from stations. We have believed for quite a while that no one service can claim to have an "in" or "guaranteed" placement capability. Ms. Davids's comments have reinforced that idea. And her chart of distribution companies is a much-needed and long-overdue report on the state of the VNR industry today.

Joseph A.M. Ricci
Broadcast Supervisor
D-A-Y Public Relations
New York, NY

Your article paints a pretty bleak picture of a television technique that is very effective when it is done right. But it takes people who know how to produce a VNR on any topic—not just a big, easy story. And it takes people who know that placement isn't magic or hit or miss but hard work.

Daniel G. Johnson
President
DWJ Associates
New York, NY

PRSA Public Relations Society of America
33 Irving Place, New York, NY 10003
(212) 995-2230

The Public Relations Society of America (PRSA) is an individual membership professional society of 14,265 public relations practitioners. Its major services to members include programs of Professional Development and Accreditation, an Information Center, publications, tracking of issues of national concern, and promotion of ethical practice through adherence to PRSA's "Code of Professional Standards." PRSA's mission is "To serve the public need for understanding and cooperation among its diverse interests by fostering high professional and ethical standards for all those practicing public relations."

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TOP HEAVY

by AMY J. BARNES

THE 17TH ANNUAL REVIEW OF CORPORATE ADVERTISING EXPENDITURES

CORPORATE advertisers went on a spending spree in 1987. Total expenditures by corporations jumped 21.2 percent, to $941 million from $776 million, in six monitored media categories, according to a report conducted by Leading National Advertisers (LNA).

Network television saw the biggest increase, 51.5 percent—to $373 million, from $246 million the year before. Spending on spot TV, cable TV, and radio also increased sharply, while that for consumer magazines, newspaper supplements, and outdoor advertising (billboards) inched ahead (see Table 1).

According to several corporate-advertising watchers, however, most of the increase can be traced to spending surges by the largest players.

Giant corporations such as AT&T and IBM spend the bulk of the total corporate-advertising money, says Dick Severance, executive vice president of the Television Bureau of Advertising—a marketing-trade association for the TV industry—so shifts in their spending can have a great impact on the overall trends. In fact, LNA reports a 35.6 percent increase in total spending by the top-10 corporations alone (see Table 2), to $344 million from $253 million.

The roster on this top-10 corporate-advertiser list has remained relatively unchanged since 1986, with large corporations such as AT&T, Dow Chemical, Prudential Insurance, and IBM returning from last year. Newcomers to the list include Chrysler, General Electric, and Sears Roebuck (see Table 2).

Corporate-ad spending by Prudential—number five on the corporation chart, according to LNA—exemplifies the trend of the largest ad spenders upping their ante. The company doubled its corporate-advertising expenditures in 1987 over the previous year, contributing a whopping $30 million to the corporate ad totals. Most of that money went to network television, where its spending jumped by nearly $10 million from the year before. While a new ad campaign was not launched last year (the typical reason for a large spending increase), according to Connie Sartain, Prudential's vice president of public affairs, two new TV commercials did evolve from the earlier campaign.

These high-tech commercials, featuring computer-generated animation to depict the Prudential rock floating through a canyon or sitting in a "surrealistic dreamscape," sport the theme lines "Soar beyond Your Expectations," and "If You Can Dream It, You Can Do It," says Gabrielle Shanin, Prudential's director of advertising.

Like recent campaigns of other large insurance companies, Prudential's is intended to reach beyond investors to consumers, to let them know that the company sells a wide range of financial services in addition to insurance, Sartain says. "The inspirational 30-second spots also try to instill confidence in consumers that Prudential can help them achieve their financial security," Shanin adds.

For purposes of the survey, corporate advertising is broadly defined as any advertising promoting the corporation, rather than a specific product. It also includes issues advertising. The 1987 corporate-advertising survey tracks corporate-advertising expenditures in consumer magazines; in newspaper supplements (*Parade, USA Weekend,* and the Sunday magazine supplements in the *Los Angeles Times* and the *New York Times*); on network, spot, and cable television; on radio; and outdoor. The review of corporate-advertising spending is published annually in *PRJ*. It

Illustrations by Patricia V.W. Johanssen

TABLE 1: CORPORATE ADVERTISING EXPENDITURES, 1983–1987

Corporation Advertising (in $ thousands)

	Consumer Magazines	Newspaper Supplements	Network Television	Spot Television	Radio	Outdoor	SIX-MEDIA TOTALS	Cable TV Networks*
1983	219,512.7	4,205.5	197,267.9	25,201.6	9,661.0	843.0	**456,700.7**	*
1984	296,309.9	9,465.4	366,591.8	97,080.0	10,318.9	3,219.0	**782,985.0**	*
Percent change	34.9%	125.0%	85.8%	285.2%	6.8%	281.8%	**69.2%**	
1985	323,323.4	10,498.9	259,148.8	103,820.2	13,450.9	4,455.4	**714,697.6**	11,315.9
Percent change	9.1%	10.9%	(29.3%)	6.9%	30.4%	38.4%	**(8.7%)**	N/A
1986	343,693.3	11,924.5	246,029.1	141,065.8	25,262.1	8,022.8	**775,997.6**	9,794.0
Percent change	6.3%	13.6%	(5.1%)	35.9%	87.8%	80.1%	**8.6%**	(13.4%)
1987	356,978.4	12,021.9	372,852.2	162,873.4	27,890.4	8,161.1	**940,777.4**	10,766.6
Percent change	3.9%	0.8%	51.5%	15.5%	10.4%	1.7%	**21.2%**	9.9%

Association Advertising (in $ thousands)

	Consumer Magazines	Newspaper Supplements	Network Television	Spot Television	Radio	Outdoor	SIX-MEDIA TOTALS	Cable TV Networks*
1983	46,059.4	3,569.3	70,001.7	202,838.6	8,968.7	9,600.5	**341,038.2**	*
1984	53,260.9	2,301.4	75,512.5	287,986.5	11,504.9	4,602.7	**435,168.5**	*
Percent change	15.6%	(35.5%)	7.9%	42.0%	28.3%	(52.0%)	**27.6%**	
1985	69,351.6	5,597.2	103,073.0	393,858.2	15,717.9	7,009.7	**594,607.6**	3,171.7
Percent change	30.2%	143.2%	36.5%	36.8%	36.6%	52.2%	**36.6%**	N/A
1986	79,732.8	5,864.7	147,625.2	571,025.9	19,703.5	8,053.2	**832,005.3**	6,180.3
Percent change	15.0%	4.8%	43.2%	45.0%	25.4%	14.9%	**40.0%**	94.9%
1987	85,519.8	3,614.4	156,625.3	722,633.3	15,519.4	7,387.5	**991,299.7**	9,712.8
Percent change	7.3%	(38.4%)	6.1%	26.6%	(21.2%)	(8.3%)	**19.1%**	57.2%

Source: BAR/LNA Corporate and Association Report as compiled by Leading National Advertisers

*1985 = first year measured

The increase can largely be traced to spending surges by the biggest players.

reflects figures compiled by LNA and Broadcast Advertisers Reports (BAR), which monitor and categorize advertising after the ads have run.

In addition to the LNA study, corporate-advertising spending was also found to have increased in a separate study conducted by the Association of National Advertisers (ANA) with 193 responding members—who rank among the largest general advertisers in the package-goods, service, and consumer-product industries. This study, conducted in April 1988 and measuring planned 1988 campaign spending, found that total spending for corporate ads by ANA respondents increased 11 percent, to $501 million in 1988 from $452 million in 1987.

The total number of companies conducting corporate ad campaigns, however, did drop slightly, according to the ANA study, to 50.8 percent in 1988, from 55.9 percent in 1987. Several respondents attributed this decline to a "wait-and-see" attitude by corporations that were daunted by October's stock market crash. "The ANA study was conducted during the spring when economic conditions were very much in doubt following the stock-market crash and top management was concerned how it would affect the economy," says corporate-advertising consultant Tom Garbett, who prepared the ANA report.

One of the most interesting findings of the ANA is a reported shift in the target audience for corporate ads. The business and financial communities, the most common target for corporate-ad campaigns, had to share the limelight in this year's survey with the "upscale" audience (this group is now sought by 63.1 percent, compared with 38.9 percent for the business community and 33.7 percent for the financial community).

"Corporate advertisers are becoming more and more focused in the delivery of their messages and are more directed to an 'upscale' target," says Edward MacEwen, chairman of the ANA corporate communications committee and vice president of corporate communications at GTE. Advertisers are homing in on their targets more than ever before to meet the intense pressure exerted by stockholders and corporate executives for bottom-line returns on their advertising dollars, MacEwen adds. But corporations have not abandoned business and financial communities, Garbett emphasizes. Rather, they are now able to encompass a broader audience, as a result of beefing up their advertising budgets to increase sales.

Perhaps it is because many corporate advertisers are going after a more consumer-oriented audience that network television spending increased so markedly in 1987. Fred Poppe, president emeritus of Poppe Typson (a firm specializing in business-to-business advertising) and longtime corporate advertising observer, offers an additional reason. Larger consumer agencies are now directing corporate-ad campaigns, Poppe notes, because many smaller business-to-business shops have been gobbled up by their bigger brothers. The primary medium of these larger firms has traditionally been network television (since their accounts are mostly package goods), he observes, so it's only natural that they would turn to TV for their corporate-ad campaigns as well.

Corporations are also continuing the trend begun a few years ago toward harder-hitting, more sales-oriented corporate ads (see "Tough Stuff," September 1987, page 28). "Today, as more and more CEOs come under the gun from their stockholders, they increasingly want more bang for their buck," Poppe says. In the never-ending process of paring expenses, the advertising and promotion budgets are the first targets of CEO scrutiny. As a result, he says, CEOs have become more involved than ever in campaign planning with a heavy emphasis on quick paybacks.

In the past if a corporate campaign increased awareness of the corporation's name by 15 to 20 percent that was enough, Poppe says. "But today's CEOs are mercenaries who want direct returns at the cash register," he adds. "An awful lot of companies have had great names and have gone bankrupt." Garbett agrees, noting that throughout the eighties, as corporations have become increasingly competitive, they have more acutely emphasized bottom-line returns.

Associations, too, seem to be looking for bottom-line bangs for their corporate-ad bucks. Like last year's listing of association top-10

WALL STREET JOURNAL

Top 10 Spenders/Corporations

	1987 Dollars
1. Drexel Burnham Lambert	$5,608,357
2. Merrill Lynch	4,224,967
3. Chase Manhattan	3,264,024
4. Morgan JP	2,978,119
5. Citicorp	2,864,848
6. Texas Instruments	2,574,153
7. American Express	2,459,514
8. Goldman Sachs	2,392,088
9. General Electric	2,320,605
10. Xerox	2,180,434

Source: BAR/LNA Corporate and Association Report and the *Wall Street Journal* data compiled by LNA.

TABLE 2: TOP 10 LEADERS IN CORPORATE ADVERTISING SPENDING: CORPORATIONS January–December 1987 (ranked by total media dollars in $ thousands)

	7-MEDIA TOTAL	Magazines	Newspaper Supplements	Network Television	Spot Television	Network Radio	Outdoor	Cable TV Networks
AT&T Co.	$83,046.4	$22,178.0	$365.2	$48,914.8	$6,783.3	$3,400.7	$2.4	$1,402.0
Ford Motor Co.	41,648.9	15,809.2	35.4	17,248.6	516.0	7,744.3	136.7	158.7
IBM Corp.	41,526.1	9,774.2	858.2	29,407.3	817.2	551.8	8.9	108.5
Dow Chemical Co.	30,840.3	6,632.3	296.6	17,695.7	1,394.5	4,623.9	31.6	165.7
Prudential Insurance Co. of America	29,693.6	7,669.2	3,319.8	18,244.3	351.6	—	62.0	46.7
Chrysler Corp.	28,925.6	10,510.8	521.2	16,638.4	53.4	1,000.8	23.0	178.0
General Motors Corp.	28,330.4	17,282.9	130.3	7,721.3	2,044.2	537.2	323.4	291.1
US Sprint Communications Co.	21,561.9	11.4	—	17,119.2	4,097.6	—	—	333.7
General Electric Co.	19,881.1	1,170.5	—	17,727.3	891.6	60.0	31.3	0.4
Sears Roebuck & Co.	18,140.7	725.6	—	12,382.9	2,023.9	2,723.0	2.4	282.9
TOP 10 TOTAL	$343,595.0	$91,764.1	$5,526.7	$203,099.8	$18,973.3	$20,641.7	$621.7	$2,967.7

TABLE 3: TOP 10 LEADERS IN CORPORATE ADVERTISING SPENDING: ASSOCIATIONS January–December 1987 (ranked by total media dollars, in $ thousands)

	7-MEDIA TOTAL	Magazines	Newspaper Supplements	Network Television	Spot Television	Network Radio	Outdoor	Cable TV Networks
GM Corp. Dirs. Assn.	$156,769.0	$70.3	—	—	$156,635.6	$7.4	$55.7	—
American Dairy Assn.	92,827.2	454.9	—	76,699.1	12,892.6	—	700.8	2,079.8
Ford Auto Dirs. Assn.	92,698.1	—	—	37.9	90,971.2	—	1,689.0	—
Nissan Auto Dirs. Assn.	51,294.2	—	—	—	51,290.2	—	4.0	—
Toyota Auto Dirs. Assn.	47,463.2	—	—	—	47,452.2	—	11.0	—
Hyundai Group	36,042.3	—	—	—	36,042.3	—	—	—
Honda Dirs. Assn.	30,272.9	—	—	—	30,272.9	—	—	—
Toyo Kogyo Co. Auto Dirs. Assn.	29,453.8	—	—	—	29,451.1	—	—	2.7
Nat'l Live Stock & Meat Board	29,074.3	8,935.6	—	13,942.1	2,743.4	3,072.3	—	380.9
Blue Cross/Shield Assn.	28,444.6	908.3	—	4,426.6	22,085.0	—	1,021.6	3.1
TOP 10 TOTAL	$594,339.6	$10,369.1	—	$95,105.7	$479,836.5	$3,079.7	$3,482.1	$2,466.5

Today's CEOs have become more involved than ever in campaign planning.

spenders, this year's list featured an overwhelming number of automobile dealer associations (see Table 3). One of the two organizations debuting on the association list was the National Live Stock and Meat Board (NLSMB), the other being the Honda Dealers Association. The only non-car organization in the heaviest-spender category, the NLSMB spent more than $29 million for television, radio, and magazine advertising, LNA reports.

As the American Dairy Association did when it broke its campaign two years ago, the NLSMB campaign relies on money provided by government-established programs to help increase consumption. A national "check-off" program assesses a fee for each head or pound of value of livestock sold, to be used for the corporate-ad campaign. The organization includes beef, pork, and veal producers, who've seen their products fall on hard times as America's infatuation with meat gives way to health concerns. New campaigns were launched in 1987 to help increase pork and veal consumption, and the beef producers stepped up the celebrity-based "Real Beef for Real People" campaign, begun in January 1987, focusing on the nutrition, convenience, and popularity of beef.

The pork group broke its campaign in March 1987, aimed at helping pork shed its relatively old-fashioned image, says Barry Pfouts, director of marketing for the National Pork Producers Council. "The 'Pork, the Other White Meat' campaign, which covered 25 markets using primarily spot TV and consumer magazines, is intended to reeducate consumers on the fact that pork is now 50 percent leaner than it was 20 years ago," Pfouts says. The campaign already appears to be bringing home the bacon. After just 10 weeks of TV advertising, studies showed that the number of people who think of pork as a white meat rose dramatically.

The veal producers too have hit the campaign trail, using the tag lines "Veal Versatile," and "Make It Easy, Make It Veal," among others, in an effort to show consumers that veal is as simple to cook as chicken. Recipes also are featured to show restaurateurs new ways to prepare veal.

Similarly, the Honda Dealers Association—number seven on the association list—walks a thin line between corporate and product advertising. Though it doesn't sell one particular product, but rather the entire product line, this type of campaign clearly differs from the old-school, image-building genre.

"The Honda Dealers spending for corporate advertising has risen substantially due to the increasingly competitive car market," says Bill Young, assistant manager of the Honda national advertising department. Dealer groups, which finance their local advertising campaigns with deductions from each car sold, have been raising their assessments to shore up local-advertising efforts, he says.

WALL STREET JOURNAL

Top 10 Spenders/Associations

	1987 Dollars
1. American Gas	$885,540
2. Blue Cross & Blue Shield	681,872
3. U.S. Council for Energy Awareness	360,833
4. American Bankers	253,989
5. National Live Stock & Meat Board	169,326
6. National Federation of the Blind	132,428
7. Canary Islands Cigars	118,984
8. Blue Shield of California	110,912
9. Acura Dealers	102,299
10. Blue Cross of California	88,740

Source: BAR/LNA [illegible] Report and the Wall Street Journal

But since local groups of Honda dealers use 36 separate advertising agencies, the look of the campaigns across the country vary greatly.

Overall, associations increased their corporate ad spending 19.1 percent, to $991 million from $832 million (see Table 1). The largest increase, according to LNA, was for cable TV, which shot up 57.2 percent. Spot and network television and consumer magazines climbed slightly, with newspaper supplements, radio, and outdoor spending falling in various degrees.

Many contend, however, that LNA's figures don't exactly reflect reality. For one thing, separating corporate from product advertising has never been easy, and the line between the two is growing finer and finer (see "Blurred Division," September 1987, page 34).

"The classifications are in the eyes of the beholder"—in this case LNA—Poppe says. "It's difficult to classify an ad as product or corporate, and 9 times out of 10 it's both. The ads are corporate in scope, but they're selling a product." Poppe contends that most good corporate ads sell the product along with the company. He points to Philip Morris's recently launched campaign—which claims that the buying power of smokers is larger than the gross national product of many small nations—as the most brilliant thing the tobacco industry has done in years. "This is strictly a corporate campaign and the public is going to remember Philip Morris's name, thereby en-

hancing its reputation," he says.

On LNA's top-10-corporations list, for example, ads placed by US Sprint and AT&T are difficult to categorize because it's almost impossible to distinguish the corporation from the service it sells. "To properly classify the ads," Poppe claims, "you have to examine the objective of the campaign, which is impossible to determine just by looking at the ad."

Corporate-advertising executives also challenge the accuracy of LNA's figures. Expenditures for the report are calculated on the basis of one-time open rates from current rate cards supplied by the media; actual expenditures, therefore, taking discounts into consideration, are probably much lower than reported. Since advertisers don't share their ad budgets with the outside world, though, using the open rate cards is the only leg LNA has to stand on.

And finally, Poppe and others claim, because LNA does not monitor specialized business-to-business and smaller, up-and-coming magazines, they may be missing a source that is often loaded with corporate ads. And the fact that LNA does not track newspapers, another heavy corporate-advertising medium, also is often raised as a criticism. In fact, the ANA study found that specialized newspapers, including the *Wall Street Journal*, the *New York Times*, and the *Washington Post*, are, along with business magazines, the most used vehicles for corporate ads. Separately, though, LNA does monitor the *Wall Street Journal*, perhaps the most popular newspaper for these ads (see boxes, pages 26 and 28, for *WSJ*'s top-10 corporate-ad spenders).

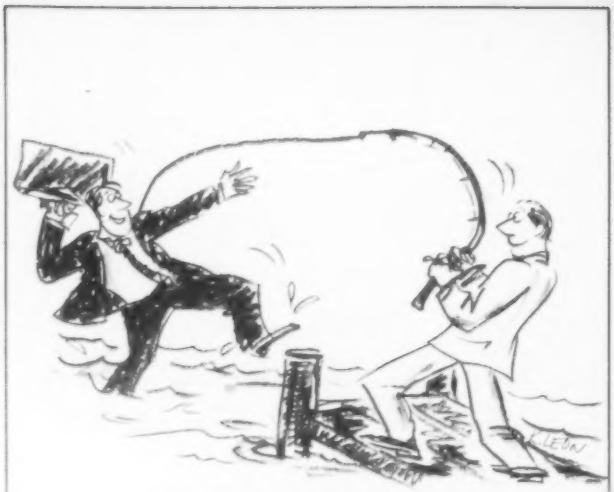
However, beginning with its 1988 monitoring, LNA plans to add 149 daily and Sunday newspapers under its blanket. Syndicated TV, which consists of non-network programming, also will be added.

And how will 1988's corporate advertising fare? Olympic and presidential election years are generally boons for corporate advertising, as organizations scramble to tie their image to the American flag. "For these events, corporations frequently bring out special ad programming," Tom Garbett observes. GTE, for example, jumped on the opportunity to appeal to readers with interests in politics when it sponsored the "GTE Presidential Forum: the Budget and Trade Deficits," a 16-page advertising supplement in the June 6 issue of *Fortune* magazine.

Coinciding with corporations' heightened desire for bottom-line paybacks, predicts Garbett, sales-related corporate advertising will continue to flourish, while long-term campaigns featuring relatively soft, "we're a great corporation"-type advertising will be harder to find. "Corporate advertising of such a nature—which is not directly going to help sales—will suffer as a result," he notes.

The Television Bureau's Severance, however, is keeping his prophecies under his hat. "Future corporate spending is simply unpredictable because companies tend to switch money from product- to corporate-advertising budgets, depending on reasons specific to the company," he says. Also, he notes, "corporations tend to do exactly the opposite of what everyone thinks they ought to do. For instance, everyone assumes a corporation would advertise more when it is doing poorly and less when it is doing well. But in practice, many corporations advertise more during good times and less during bad." ■

Amy Barnes is an editorial intern at PRJ.



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